

**Appendix A: Content of Procurement Library Materials for the 2002-2003 W-2 and Related Programs Contract**

Reference Item	Paper/Internet/ Intranet	Electronic Address
W-2 Technical Information	Internet	<a href="http://www.dwd.state.wi.us/w2tech/default.htm">http://www.dwd.state.wi.us/w2tech/default.htm</a>
Allowable Cost Policy Manual	Internet	<a href="http://www.dwd.state.wi.us/des/bds/default.htm">http://www.dwd.state.wi.us/des/bds/default.htm</a>
Benefit Recovery Accounting Manual	Internet	<a href="http://www.dwd.state.wi.us/des/bds/default.htm">http://www.dwd.state.wi.us/des/bds/default.htm</a>
CARS (Community Aids Reporting System) Manual	Internet	<a href="http://www.dwd.state.wi.us/cars/">http://www.dwd.state.wi.us/cars/</a>
DES Fiscal Memo's	Paper	
Department of Workforce Development Civil Rights Compliance Standards and Resource Manual	Internet	<a href="http://www.dwd.state.wi.us/des/bds/default.htm">http://www.dwd.state.wi.us/des/bds/default.htm</a>
Local Personnel Master File Manual	Paper	
Single Agency Audit Guide	Paper	
Provider Agency Audit Guide	Internet	<a href="http://www.dwd.state.wi.us/des/bds/default.htm">http://www.dwd.state.wi.us/des/bds/default.htm</a>
Child Care Manual	Intranet	<a href="http://dwdworkweb/des/manuals/default.htm">http://dwdworkweb/des/manuals/default.htm</a>
Food Stamp Employment and Training Program Manual	Paper	
Income Maintenance Manual	Paper	
Security Manual	Intranet	<a href="http://dwdworkweb/des/manuals/default.htm">http://dwdworkweb/des/manuals/default.htm</a>
Wisconsin CARES Guide and Supplement	Intranet	<a href="http://dwdworkweb/des/manuals/default.htm">http://dwdworkweb/des/manuals/default.htm</a>
Wisconsin Works (W-2) Financial Management Manual	Paper	
Wisconsin Works (W-2) Manual	Paper	
WAA Guide	Intranet	<a href="http://dwdworkweb/des/manuals/default.htm">http://dwdworkweb/des/manuals/default.htm</a>
State TANF Plan	Internet	<a href="http://www.dwd.state.wi.us/desw2/wi_tanf_state_plan.htm">http://www.dwd.state.wi.us/desw2/wi_tanf_state_plan.htm</a>
TANF Federal Regulations	Internet	<a href="http://www.acf.dhhs.gov/programs/ofa/finalru.htm">http://www.acf.dhhs.gov/programs/ofa/finalru.htm</a>
DES Admin memos (1/99 to present)	Intranet	<a href="http://dwdworkweb/notespub/admemos/">http://dwdworkweb/notespub/admemos/</a>
DES Admin memos (prior to 1/99)	Paper	
Child Support Bulletins (1/30/98 to present)	Intranet	<a href="http://dwdworkweb/des/bcs/bulletin/01bulls.htm">http://dwdworkweb/des/bcs/bulletin/01bulls.htm</a>
Child Support Bulletins (prior to 1/30/98)	Paper	
Operations Memo (1/99 to present)	Intranet	<a href="http://dwdworkweb/des/bwsp/oms_indexes.htm">http://dwdworkweb/des/bwsp/oms_indexes.htm</a>
Operations Memos (prior to 1/99)	Paper	
Wisconsin Administrative Code 11	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd011.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd011.pdf</a>
Wisconsin Administrative Code 12	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd012.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd012.pdf</a>
Wisconsin Administrative Code 16	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd016.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd016.pdf</a>
Wisconsin Administrative Code 17	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd017.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd017.pdf</a>
Wisconsin Administrative Code 18	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd018.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd018.pdf</a>
Wisconsin Administrative Code 55	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd055.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd055.pdf</a>
Wisconsin Administrative Code 58	Internet	<a href="http://www.legis.state.wi.us/rsb/code/dwd/dwd058.pdf">http://www.legis.state.wi.us/rsb/code/dwd/dwd058.pdf</a>
2001-2003 Biennial Budget Bill	Internet	<a href="http://www.legis.state.wi.us/2001/data/SB-55.pdf">http://www.legis.state.wi.us/2001/data/SB-55.pdf</a>

## Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract

Allocations information for the W-2 and Related Programs Contract for the 2002-2003 Contract Period is presented on the attached charts. Because Legislative and Governor action is pending on the Biennial Budget Act which covers the 2002-2003 Contract Period, the allocations information is subject to revision. It is presented for W-2 agency information purposes only.

### Base Allocations

The Base Allocation for W-2 and Related Programs is identified by W-2 agency (based on the W-2 agencies for the 2000-2001 W-2 and Related Programs Contract) (see W-2 Base Allocations chart) and includes the following two parts:

- Services/Administration: funding staff salaries and fringe benefits, services, overhead, and other non-benefit allowable expenditures.
- Benefits: funding for CSJs, W-2 T, and Custodial Parent of an Infant payments for the estimated caseload in each W-2 agency.

### Allocation Adjustments

In order to determine the Base Allocation, the following adjustments were made:

- 1) Small Agency Supplement: to provide a supplement to the W-2 geographic areas with the smallest allocations to reflect the need for a minimal capacity to deliver the W-2 program and to bring allocations to a \$250,000 minimum level for the combination of both Services/Administration and Benefits;
- 2) Minimum Benefits Amount: to provide an estimated amount for Benefits equivalent to five (5) W-2 Payment Cases to any W-2 geographic area that had fewer than five (5) W-2 Payment Cases in the caseload estimate; and
- 3) Milwaukee: to recognize the increased number of case transfers in Milwaukee because the county is divided into multiple geographic areas, as compared to other W-2 geographic areas. One half of the Base Allocation was distributed by caseload and one half was equally distributed among the W-2 geographic areas in that county.

The sum of Services/Administration with any adjustment if applicable for Small Agency Supplement and Benefits allocations is the Base Allocation. Although information is presented for the separate categories of Services/Administration and Benefits, a W-2 agency has the flexibility to use the Base Allocation for allowable expenses even if the ratio between Services/Administration and Benefits differs from the amounts in the chart.

### Caseload Assumptions

The W-2 agency must serve all applicants seeking assistance. Providing required services is assumed within the Base Allocation although there is no specific "case count" for some activities. It is understood that some applicants will be ineligible for payment benefits or other program services. It is also understood that some applicants will decline further services, or use Job Center resources (e.g. JobNet) to obtain employment without further assistance from the W-2 agency.

For the 2002-2003 W-2 and Related Programs Contract, allocations are based on the following concepts:

- 1) Although the number of cases receiving a payment has been reduced significantly since the start of W-2, there are many cases in addition to W-2 Payment Cases that the W-2 agencies are required to serve;
- 2) The composition of the caseload varies significantly from geographic area to geographic area; and
- 3) Although each case is unique, some categories of cases generally require more effort than other categories of cases.

**Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)**

Caseload numbers for W-2 Payment Cases, W-2 Non-Payment Cases (also referred to as Case Management only), Food Stamp Employment and Training (FSET) Cases, and Child Care Cases were taken from CARES data (EOS Report CT03). For W-2 Payment, and W-2 Non-Payment Cases the average monthly caseload for the period January 2000 through January 2001 was projected for the Contract Period. For FSET and Child Care cases, the average monthly caseload for the period January 2000 through February 2001 was projected for the Contract Period. Because caseload numbers are dynamic, the figures are intended to demonstrate relative workload between agencies, and do not necessarily provide an absolute picture of the projected workload for a W-2 agency.

Caseload Adjustment for Difficulty Factors

Although many factors can make one case more “difficult” than another (e.g., amount of education or work experience of the participant, language barriers, mental health issues, physical disabilities), the Department has identified two factors that will be used in adjusting the W-2 agency’s caseload estimate for allocation purposes.

- 1) Educational attainment - for each case where the adult has not achieved a High School diploma or equivalent; and
- 2) Disabled child or adult – for each case where the adult or a child has a disability as identified in CARES.

A point-in-time report (FCB 2001) was used to determine the number of cases with either or both of the characteristics described above. Regardless of the size of the agency’s caseload, each occurrence of either of the two factors above will increase that W-2 agency’s caseload by one case to establish an Adjusted Caseload. The Adjusted Caseload is used to distribute available Services/Administration funds proportionately among the W-2 agencies. See W-2 Base Allocations – Caseload Data chart.

Funding Level Supplement(s)

At any time(s) during the Contract Period and for any uses allowed by the Department for this Contract, a W-2 agency may supplement the funding level available for this Contract with funding already earned by the W-2 agency for TANF restricted-use funding (referred to as “Community Reinvestment”). The amount(s) and frequency of any supplement(s) are at the discretion of the W-2 agency. The W-2 agency will report any supplement(s) to the Department in accordance with the Department’s fiscal policies and procedures.

Funding Outside the Base Allocation

Other funds available to W-2 agencies but not reflected in the Base Allocation for the 2002-2003 W-2 Contract and Related Programs include the following:

- Workforce Advancement and Attachment funds (see JAL & WAA Allocations chart);
- Job Access Loan funds (see JAL & WAA Allocations chart);
- Children First funds (based on a local decision regarding whether the W-2 or child support agency will administer the program);
- Employment Skill Advancement Program funds (a total of \$200,000 for the Contract period is available to W-2 agencies on a first come, first served basis until funds are fully spent);
- Supplemental Food Stamp Employment Training funds to match local funds are available at the request of the W-2 agency as long as the W-2 agency is a county or tribe, based on federal regulations. (The requirement to serve FSET cases is covered by the Base Allocation);

**Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)**

- Refugee Cash Assistance funds (based on specific eligibility and reporting of costs);
- 100 percent Federally Funded Food Stamp Employment Training funds for Able-bodied Adults without Dependents (ABAWDs) for W-2 agencies as long as the state receives 100 percent Federally Funded FSET funding; (The requirement to serve FSET cases including ABAWDs is covered by the Base Allocation);
- Contracted Child Care funds (based on a specific plan submitted by the W-2 agency for the Department's approval);
- Community Reinvestment funds earned under the 1997-1999 Wisconsin Works (W-2) Implementation Contract approved by the Department for carryover into the 2002-2003 Contract Period (Funds approved for carryover must be spent by June 30, 2002.);
- Community Reinvestment funds earned under the 2000-2001 Wisconsin Works (W-2) and Related Programs Implementation Contract;
- Transition funds for new W-2 agencies or existing W-2 agencies operating in different geographic areas (based on available funds).

Allocation Method for Workforce Advancement and Attachment funds for W-2 Agencies

In accordance with Wisconsin Statutes, case counts for W-2 case management cases, FSET, Child Care, diversions from W-2 and non-custodial parents were used in the allocation formula.

Allocation Method for Job Access Loan Funds for W-2 Agencies

Job Access Loan funds were allocated based on a proportion of the W-2 Base Allocation Contract plus additions for usage of JAL funds under the 2000 - 2001 JAL contract.

Funding that was part of the 2000-2001 W-2 and Related Programs Implementation Contract that will not be a part of the 2002-2003 W-2 and Related Programs Contract

The philosophical direction of the W-2 program for the 2002-2003 Contract Period emphasizes retention and advancement in the workplace. A distinction is being made between entitlement programs and non-entitlement work-based programs. Entitlement programs are being aligned with the Income Maintenance (IM) contract and the non-entitlement work-based programs are being aligned with the W-2 contract. For this reason, the responsibilities for and funding for eligibility determination and case processing for entitlement programs (i.e., Food Stamps and Medicaid) is removed from the W-2 Contract beginning January 1, 2002. The numbers presented in the following charts reflect the removal of funding for Food Stamp and Medicaid eligibility determination processing.

Child Care Administrative Funding

The Base Allocations for W-2 agencies includes funding for determining eligibility for subsidized child care. That responsibility has been a requirement of the W-2 agencies since the first W-2 contract and continues to be a requirement in the 2002-2003 contract. A statutory change is needed in order to assign other child care administrative activities to the W-2 agencies. The Department values child care as an integral part of the employment and training services it delivers. No change in allocations has been reflected on the attached charts for the movement of child care administrative responsibilities from the IM agencies to the W-2 agencies.

## Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)

**W-2 Base Allocations – Caseload Data**  
**April 27, 2001**

W-2 Agency by Geographic Area	W-2 Pay-ment	W-2 non Payment	FSET	Child Care	W-2 AG less than HS	W-2 AG-With Disabled Child or Adult	Adjusted Caseload
Adams Co	4	6	13	47	2	1	73
Ashland Co	5	1	6	88	3	1	104
Bad River Tribe	6	2	3	29	1	1	42
Barron Co	5	3	17	133	8	1	167
Bayfield Co	3	1	8	30			42
Brown Co	18	16	41	685	17	3	780
Buffalo Co	2	4	8	28	1		43
Burnett Co	2	2	4	24			32
Calumet Co	6	4	2	70	7		89
Chippewa Co	12	9	5	170	13	2	211
Clark Co	4	4	20	32	2	1	63
Columbia Co	9	16	10	99	4	3	141
Crawford Co	1			44			45
Curtis & Assoc. Waukesha	38	33	49	509	23	4	656
Dane Co	294	194	119	1,478	212	73	2,370
Dodge Co	19	24	18	216	16	8	301
Door Co	6	7	5	77	4	1	100
Douglas Co	27	26	66	203	20	5	347
Dunn Co	19	24	10	73	4	2	132
Eau Claire Co	16	19	42	376	18	8	479
Fond du Lac Co	43	21	21	271	23	16	395
Forward Service Florence	2	3	3	11	5	1	25
Forward Service FOV	10	8	24	133	16	2	193
Forward Service Kewaunee	4	2	3	33	1		43
Grant (SW Consortium)	11	12	21	266	1	6	317
Green Lake Co	2	3	12	41		1	59
Iron Co	2	2	1	21		2	28
Jackson Co	4	1	24	29	3	2	63
Jefferson Co	7	10	4	91	5	1	118
Kaiser Group Walworth	27	10	19	136	10	4	206
Kenosha Co	209	149	167	616	147	52	1,340
La Crosse Co	22	18	22	428	13	7	510
Langlade Co	11	7	24	59	13	3	117
Lincoln Co	5	2	15	75	2	1	100
Manitowoc Co	2	3	4	100	1	2	112
Marathon Co	43	24	34	387	42	13	543
Marinette Co	4	1	17	62	1	1	86
Marquette Co	3	1	6	38	6	3	57
Menominee Co	9	6	10	40	5		70
Milwaukee - Region 4	948	553	414	1,592	820	146	4,473
Milwaukee - Region 5	800	536	295	1,886	718	131	4,366
Milwaukee - MAXIMUS	1,035	534	470	1,540	963	136	4,678
Milwaukee - OIC-GM	1,006	655	229	1,617	839	149	4,495
Milwaukee - UMOS	793	552	403	949	715	129	3,541
Milwaukee - YW Works	632	418	356	987	495	86	2,974
Oconto Co	3	1	16	90	2		112
Oneida Tribe	11	17	4	52	11	1	96

## Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)

W-2 Agency by Geographic Area	W-2 Pay-ment	W-2 non Pay-ment	FSET	Child Care	W-2 AG less than HS	W-2 AG-With Disabled Child or Adult	Adjusted Caseload
Outagamie Co	34	46	20	359	31	8	498
Ozaukee Co	2		3	118	1	1	125
Pepin Co			3	17			20
Pierce Co	4	3	1	71	1	1	81
Polk Co	7	17	13	114	8		159
Portage Co	5	10	5	180	2	2	204
Price Co	5	5	13	73	2	4	102
Racine Co	115	18	120	726	61	30	1,070
Rock Co	105	31	35	531	55	21	778
Rusk Co	2	3	7	43	2		57
Sauk Co	13	5	23	103	6	2	152
Sawyer Co	4	6	4	115			129
Shawano Job Center	15	11	8	91	8	3	136
Sheboygan Co	24	19	16	165	23	8	255
St. Croix Co	8	11	5	85	2	3	114
Taylor Co	2	3	3	34	5		47
Trempealeau Co	5	3	6	95	1	4	114
Vernon Co	5	2	8	42			57
Washburn Co	3	3	4	44		1	55
Washington Co	13	12	18	216	6	3	268
Waupaca Co	22	18	9	73	11	10	143
Waushara Co		1	9	54			64
Winnebago Co	44	43	26	444	31	7	595
Wood Co	29	13	48	246	20	6	362
Workforce Conn Juneau	17	24	10	58	8	5	122
Workforce Conn Monroe	21	16	13	119	8	2	179
<b>Totals</b>	<b>6,648</b>	<b>4,267</b>	<b>3,494</b>	<b>20,177</b>	<b>5,504</b>	<b>1,130</b>	<b>41,220</b>

For W-2 Payment, and W-2 Non-Payment Cases the average monthly caseload for the period January 2000 through January 2001 was projected for the Contract Period.

For FSET and Child Care cases, the average monthly caseload for the period January 2000 through February 2001 was projected for the Contract Period.

For the adjustment for difficulty factors a point-in-time count for February 2001 was projected for the Contract Period.

## Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)

**W-2 Base Allocations**  
**May 14, 2001**

W-2 Agency by Geographic Area	Services/ Administration	Benefits *	Small Agency Supplement	Base Allocations
Adams Co	369,593	77,469		447,062
Ashland Co	526,543	77,469		604,012
Bad River Tribe	212,642	92,963		305,605
Barron Co	845,507	77,469		922,976
Bayfield Co	212,642	77,469		290,111
Brown Co	3,949,072	278,889		4,227,961
Buffalo Co	217,705	77,469		295,174
Burnett Co	162,164	77,469	10,367	250,000
Calumet Co	450,599	92,963		543,562
Chippewa Co	1,068,275	185,926		1,254,201
Clark Co	318,964	77,469		396,433
Columbia Co	713,871	139,445		853,316
Crawford Co	227,831	77,469		305,300
Curtis & Assoc. Waukesha	3,321,271	588,767		3,910,038
Dane Co	11,999,104	4,555,194		16,554,298
Dodge Co	1,523,937	294,383		1,818,320
Door Co	506,291	92,963		599,254
Douglas Co	1,756,831	418,334		2,175,165
Dunn Co	668,305	294,383		962,688
Eau Claire Co	2,425,135	247,902		2,673,037
Fond du Lac Co	1,999,851	666,236		2,666,087
Forward Service Florence	126,691	77,469	45,840	250,000
Forward Service FOV	977,143	232,407		1,209,550
Forward Service Kewaunee	217,705	77,469		295,174
Grant (SW Consortium)	1,605,071	387,345	35,705	2,028,121
Green Lake Co	298,712	77,469		376,181
Iron Co	141,894	77,469	30,637	250,000
Jackson Co	318,964	77,469		396,433
Jefferson Co	597,424	108,457		705,881
Kaiser Group Walworth	1,042,960	418,334		1,461,294
Kenosha Co	6,784,304	3,238,216		10,022,520
La Crosse Co	2,582,086	340,865		2,922,951
Langlade Co	592,361	170,432		762,793
Lincoln Co	506,291	77,469		583,760
Manitowoc Co	567,046	77,469		644,515
Marathon Co	2,749,162	666,236		3,415,398
Marinette Co	435,411	77,469		512,880

**Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)**

<b>W-2 Agency by Geographic Area</b>	<b>Services/ Administration</b>	<b>Benefits*</b>	<b>Small Agency Supplement</b>	<b>Base Allocations</b>
Marquette Co	288,586	77,469		366,055
Menominee Co	354,404	139,445		493,849
Milwaukee - Region 4	21,059,370	14,688,176		35,747,546
Milwaukee - Region 5	21,935,050	12,395,086		34,330,136
Milwaukee - MAXIMUS	20,904,336	16,036,142		36,940,478
Milwaukee - OIC-GM	20,665,741	15,586,820		36,252,561
Milwaukee - UMOS	19,900,827	12,286,629		32,187,455
Milwaukee - YW Works	19,712,747	9,792,118		29,504,864
Oconto Co	567,046	77,469		644,515
Oneida Tribe	486,040	170,432		656,472
Outagamie Co	2,521,331	526,791		3,048,122
Ozaukee Co	632,864	77,469		710,333
Pepin Co	101,353	77,469	71,178	250,000
Pierce Co	410,096	77,469		487,565
Polk Co	805,003	108,457		913,460
Portage Co	1,032,834	77,469		1,110,303
Price Co	516,417	77,469		593,886
Racine Co	5,417,317	1,781,794		7,199,111
Rock Co	3,938,946	1,626,855		5,565,801
Rusk Co	288,586	77,469		366,055
Sauk Co	769,563	201,420		970,983
Sawyer Co	653,116	77,469		730,585
Shawano Job Center	688,556	232,408		920,964
Sheboygan Co	1,291,043	371,853		1,662,896
St. Croix Co	577,172	123,951		701,123
Taylor Co	237,957	77,469		315,426
Trempealeau Co	577,172	77,469		654,641
Vernon Co	288,586	77,469		366,055
Washburn Co	278,460	77,469		355,929
Washington Co	1,356,861	201,420		1,558,281
Waupaca Co	723,997	340,865		1,064,862
Waushara Co	324,026	77,469		401,495
Winnebago Co	3,012,433	681,730		3,694,163
Wood Co	1,832,775	449,322		2,282,097
Workforce Conn Juneau	617,675	263,396		881,071
Workforce Conn Monroe	906,261	325,371		1,231,632
<b>Totals</b>	<b>208,693,905</b>	<b>104,165,200</b>	<b>193,727</b>	<b>313,052,831</b>

\*Note: The amount per case is the result of the calculation of the total amount available from the Biennial Budget for Benefits divided by the caseload.



## Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)

## JAL & WAA Allocations

### May 14, 2001

W-2 Agency by Geographic Area	JAL * Allocations	WAA Allocations
Adams Co	1,756	30,249
Ashland Co	3,881	41,014
Bad River Tribe	1,234	19,740
Barron Co	3,102	62,801
Bayfield Co	943	22,560
Brown Co	13,506	221,206
Buffalo Co	2,339	22,303
Burnett Co	4,345	20,509
Calumet Co	3,020	32,300
Chippewa Co	4,776	66,902
Clark Co	3,485	30,249
Columbia Co	2,814	49,217
Crawford Co	1,008	27,942
Curtis & Assoc. Waukesha	35,008	276,058
Dane Co	66,574	594,917
Dodge Co	8,281	95,610
Door Co	1,897	39,220
Douglas Co	14,902	96,123
Dunn Co	13,597	46,910
Eau Claire Co	20,293	135,596
Fond du Lac Co	17,046	159,689
Forward Service Florence	799	15,383
Forward Service FOV	6,791	92,284
Forward Service Kewaunee	943	20,253
Grant (SW Consortium)	11,103	155,860
Green Lake Co	2,033	26,404
Iron Co	799	17,177
Jackson Co	1,169	26,661
Jefferson Co	2,887	54,598
Kaiser Group Walworth	8,137	74,592
Kenosha Co	111,205	367,818
La Crosse Co	16,390	148,155
Langlade Co	2,255	38,708
Lincoln Co	3,191	38,964
Manitowoc Co	2,059	53,830
Marathon Co	13,890	133,801
Marinette Co	1,622	54,856
Marquette Co	1,299	27,430
Menominee Co	1,557	27,942

**Appendix B: Allocations Information for the 2002-2003 W-2 and Related Programs Contract (continued)**

<b>W-2 Agency by Geographic Area</b>	<b>JAL * Allocations</b>	<b>WAA Allocations</b>
Milwaukee - Region 4	258,285	721,794
Milwaukee - Region 5	248,043	978,624
Milwaukee - MAXIMUS	294,059	803,046
Milwaukee - OIC-GM	215,374	806,891
Milwaukee - UMOs	182,512	631,057
Milwaukee - YW Works	143,616	618,498
Oconto Co	3,671	44,090
Oneida Tribe	1,865	31,018
Outagamie Co	12,379	137,646
Ozaukee Co	2,334	46,653
Pepin Co	799	16,152
Pierce Co	2,766	36,401
Polk Co	12,137	51,523
Portage Co	14,355	73,823
Price Co	2,465	37,939
Racine Co	22,996	343,213
Rock Co	36,118	197,368
Rusk Co	2,683	29,224
Sauk Co	2,269	60,751
Sawyer Co	14,075	59,469
Shawano Job Center	4,975	49,473
Sheboygan Co	11,091	79,206
St. Croix Co	8,257	42,552
Taylor Co	2,389	22,816
Trempealeau Co	4,357	40,502
Vernon Co	2,017	32,043
Washburn Co	3,542	30,505
Washington Co	11,314	81,256
Waupaca Co	6,973	51,267
Waushara Co	1,283	32,812
Winnebago Co	11,800	155,845
Wood Co	30,591	95,610
Workforce Conn Juneau	3,920	39,477
Workforce Conn Monroe	12,756	55,625
<b>Totals</b>	<b>2,000,000</b>	<b>10,000,000</b>

\*The JAL allocation uses the W-2 Base Allocation as part of its formula. Accordingly this allocation was updated.

**Appendix C: Right Of First Selection Geographic Areas And Competitive Geographic Areas****66 current W-2 agencies exercising the Right Of First Selection:**

Adams County	Workforce Connections, Inc. – Monroe County
Ashland County	Oconto County
Barron County	Outagamie County
Brown County	Ozaukee County
Buffalo County	Pepin County
Burnett County	Pierce County
Calumet County	Polk County
Chippewa County	Portage County
Clark County	Price County
Crawford County	Racine County
Dane County	Rock County
Dodge County	Rusk County
Door County	St. Croix County
Douglas County	Sauk County
Dunn County	Sawyer County
Eau Claire County	Shawano County Job Center - Shawano County
Forward Services, Inc. – Florence County	Sheboygan County
Fond du Lac County	Taylor County
Forward Service Corp. – Forest, Oneida & Vilas Counties	Trempealeau County
Grant County (on behalf of W-2 Southwest Consortium)	Vernon County
Green Lake County	Kaiser Group – Walworth County
Iron County	Washburn County
Jefferson County	Washington County
Workforce Connections, Inc. – Juneau County	Curtis and Associates – Waukesha County
Kenosha County	Waupaca County
Forward Service Corp. – Kewaunee County	Waushara County
La Crosse County	Winnebago County
Lincoln County	Wood County
Manitowoc County	Bad River Tribe
Marathon County	Oneida Tribe
Marinette County	
Marquette County	
Milwaukee County - Region 1: YW Works	
Milwaukee County - Region 2: United Migrant Opportunities Services (UMOS)	
Milwaukee County - Region 3: Opportunities Industrialization Center of Greater Milwaukee (OIC-GM)	
Milwaukee County - Region 6: MAXIMUS	

**7 geographic areas are open for submission of competitive proposals:**

Bayfield County  
 Columbia County  
 Jackson County  
 Langlade County  
 Menominee County  
 Milwaukee County - Region 4\*  
 Milwaukee County - Region 5\*

\* The Department may withdraw this area from the competitive RFP process.

**Appendix D: Workforce Development Areas**

1. **Southeast**
  - Kenosha County
  - Racine County
  - Walworth County
2. **Milwaukee County**
3. **WOW**
  - Ozaukee County
  - Washington County
  - Waukesha County
4. **Fox Valley**
  - Calumet County
  - Fond du Lac County
  - Green Lake County
  - Outagamie County
  - Waupaca County
  - Waushara County
  - Winnebago County
5. **Bay Area**
  - Brown County
  - Door County
  - Florence County
  - Kewaunee County
  - Manitowoc County
  - Marinette County
  - Menominee County
  - Oconto County
  - Shawano County
  - Sheboygan County
  - Menominee Nation of Wisconsin
  - Oneida Tribe of Indians of Wisconsin
  - Stockbridge-Munsee Band of Mohican Indians
6. **North Central Wisconsin**
  - Adams County
  - Forest County
  - Langlade County
  - Lincoln County
  - Marathon County
  - Oneida County
  - Portage County
  - Vilas County
  - Wood County
  - Lac du Flambeau Tribe
  - Forest County Potawatomi Community, Inc.
  - Mole Lake Band of Sokaogon Chippewa
7. **Northwest**
  - Ashland County
  - Bayfield County
  - Burnett County
  - Douglas County
  - Iron County
  - Price County
  - Rusk County
  - Sawyer County
  - Taylor County
  - Washburn County
  - Bad River Band of Lake Superior Chippewa
  - Lac Courte Oreilles Tribal Government
  - Red Cliff Band of Lake Superior Chippewa
8. **West Central**
  - Barron County
  - Chippewa County
  - Clark County
  - Dunn County
  - Eau Claire County
  - Pierce County
  - Pepin County
  - Polk County
  - St. Croix County
  - St. Croix Band of Lake Superior Chippewa
9. **Western**
  - Buffalo County
  - Crawford County
  - Jackson County
  - Juneau County
  - La Crosse County
  - Monroe County
  - Trempealeau County
  - Vernon County
  - Ho-Chunk Nation
10. **South Central**
  - Columbia County
  - Dane County
  - Dodge County
  - Jefferson County
  - Marquette County
  - Sauk County
11. **Southwest**
  - Grant County
  - Green County
  - Iowa County
  - Lafayette County
  - Rock County
  - Richland County

**Appendix E: DWS Regional Offices/Department's Contract Managers**

JoAnn Schmidt  
Ashland Regional Office (WDA 7)  
220 Third Avenue West  
P.O. Box 72  
Ashland, Wisconsin 54806-0072  
Telephone: (715) 682-7249  
E-mail: [schmijo@dwd.state.wi.us](mailto:schmijo@dwd.state.wi.us)

Katy Kapaun  
Eau Claire Regional Office (WDAs 8 and 9)  
312 South Barstow, Suite 4  
Eau Claire, Wisconsin 54701-3697  
Telephone: (715) 830-7740  
E-mail: [drinkka@dwd.state.wi.us](mailto:drinkka@dwd.state.wi.us)

Cori McFarlane  
Green Bay Regional Office (WDAs 4 and 5)  
200 North Jefferson, Suite 428  
Green Bay, Wisconsin 54301  
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Barb Berlin  
Madison Regional Office  
3601 Memorial Drive  
Madison, Wisconsin 53704  
Telephone: (608) 243-2402  
E-mail: [berliba@dwd.state.wi.us](mailto:berliba@dwd.state.wi.us)

Talmadge Wilson  
Milwaukee Regional Office (WDA 2)  
819 North 6th Street, 6th Floor  
Milwaukee, Wisconsin 53203  
Telephone: (414) 227-4245  
E-mail: [wilsota@dwd.state.wi.us](mailto:wilsota@dwd.state.wi.us)

Janice Tripp  
Rhineland Regional Office (WDA 6)  
P.O. Box 697  
Rhineland, Wisconsin 54501  
Telephone: (715) 365-2566  
E-mail: [trippja@dwd.state.wi.us](mailto:trippja@dwd.state.wi.us)

Randy Hayward  
Waukesha Regional Office (WDAs 1 and 3)  
141 Northwest Barstow Street, Room 209  
Waukesha, Wisconsin 53188-3789  
Telephone: (414) 521-5114  
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**Appendix F: Listing of the Department's Policies and Procedures**

Department of Workforce Development/Division of Workforce Solutions Policies and Procedures: Wisconsin Works (W-2) and Related Programs

(Due to the dynamic nature of policy issuance and clarification, this listing is a point in time representation.)

**Applicable Wisconsin Statutes and Rules**

Policies and procedures also reflect requirements of Wisconsin Statutes governing appropriations, court administration, employment laws, public records and others. The following listing concentrates on programmatic requirements set forth by law or rule.

	Category *						
	CC	CS	FS	IT	MA	W-2	TANF
Wisconsin Statute Chapter 20.002(13)	X	X	X	X	X	X	X
Wisconsin Statutes Chapter 46 Social Services	X	X	X	X	X	X	X
Wisconsin Statutes Chapter 48 Children's Code	X	X	X	X	X	X	X
Wisconsin Statutes Chapter 49 Public Assistance	X	X	X	X	X	X	X
Wisconsin Statutes Chapter 59 Counties	X	X	X	X	X	X	X
Wisconsin Statutes Chapter 767 Actions Affecting the Family		X				X	X
DWD 11 Aid to families with dependent children	X		X		X	X	X
DWD 12 Wisconsin Works	X	X				X	X
DWD 16 Emergency assistance for families with needy children	X		X		X	X	X
DWD 17 Income maintenance workers	X		X	X	X	X	X
DWD 18 Public Assistance Record Retention	X	X	X	X	X	X	X
DWD 55 Day care certification	X						
DWD 56 Administration of child care funds	X						
DWD 58 Child care quality standards and grants	X						

**Manuals, Handbooks, and Guides**

	CC	CS	FS	IT	MA	W-2	TANF
Allowable Cost Policy Manual	X	X	X	X	X	X	X
Benefit Recovery Accounting Manual	X			X	X	X	X
CARS (Community Aids Reporting System) Manual	X	X	X	X	X	X	X
CATS Guide	X	X	X	X	X	X	X
Child Day Care Manual	X					X	X
Technical Specifications and Standards	X	X	X	X	X	X	X
DES Fiscal Memos	X	X	X	X	X	X	X
Department of Workforce Development Civil Rights Compliance Standards and Resource Manual	X	X	X	X	X	X	X
Food Stamp Employment and Training Program Manual			X				X
Income Maintenance Manual	X		X	X	X	X	X
Local Personnel Master File Manual	X	X	X	X	X	X	X
Provider Agency Audit Guide	X	X	X	X	X	X	X
Security Manual	X	X	X	X	X	X	X

**Appendix F: Listing of the Department's Policies and Procedures (continued)**

	CC	CS	FS	IT	MA	W-2	TANF
Single Agency Audit Guide	X	X	X	X	X	X	X
WAA Guide						X	X
Wisconsin CARES Guide and Supplement	X	X	X	X	X	X	X
Wisconsin Works (W-2) Financial Management Manual	X	X	X	X	X	X	X
Wisconsin Works (W-2) Policy Manual	X	X				X	X

**DES Administrator's Memos**

DES Administrator's Memos no longer on this list are either obsoleted or have been incorporated into relevant manuals.

No.	Title	CC	CS	FS	IT	MA	W-2	TANF
97-11	Local W-2 Community Steering Committee Development Guide						X	
97-21	Requirement for FS and MA Eligibility Determinations Certifications to be Performed by County/Tribe Staff Co-located at W-2 Agencies			X		X	X	
97-23	Case Specific Quality Assurance (QA) Disallowances			X		X		
97-24	Kinship Care Child Support Policy (Action)		X					X
97-25	Wisconsin Works Child Support Demonstration		X				X	
97-26	Required Educational Approval Board Oversight and Licensing of Educational Employment and Training Facilities						X	
98-09	Status of Review Date Changes in CARES	X		X	X	X	X	
98-12	Evaluations of W-2						X	
98-19	Update on Civil Rights Responsibilities in Complaint Processing and Subcontracting	X	X	X	X	X	X	X
98-24	Approval of All Information Technology (IT) Purchases and Non-IT Items over \$5,000	X	X	X	X	X	X	X
98-33	Child Support Cooperation Requirements for W-2 and Food Stamp Recipients		X	X			X	
99-01	New Child Care Performance Standards	X						
99-06	DES Administrator's Memo Distribution Procedures	X	X	X	X	X	X	X
99-07	CARES/KIDS and Consumer Credit Report Security Protection and Penalty Procedures	X	X	X	X	X	X	X
99-12	Performance Standards for Customer Service	X	X	X	X	X	X	X
99-16	Timeframe for Remedying Non-Cooperation		X				X	
99-24	One-Page Description of Services Available at W-2 Agency						X	
99-25	Community Reinvestment Funds-Next Process 1997-1999 W-2 Contract						X	X
00-03	2000 Income Maintenance Required Training	X	X	X	X	X	X	X
00-04	Computer Security	X	X	X	X	X	X	X
00-10	Children First Program Reimbursement Rate Increase and Policies		X				X	
00-12	Safeguarding Federal Tax Information	X	X	X	X	X	X	X
00-13	Determining W-2 Eligibility						X	X

**Appendix F: Listing of the Department's Policies and Procedures (continued)**

No.	Title	CC	CS	FS	IT	MA	W-2	TANF
00-18	Community Reinvestment Funds – Issuance of Updated Instructions and Final Amounts Earned under the 1997-1999 W-2 Contract						X	X
00-21	Required Training for Income Maintenance workers	X		X		X	X	
00-22	W-2 60-month Lifetime Eligibility limits						X	
01-03	Preparation for Re-Contracting Process for Right of First Selection Agencies for the Next W-2 Contract						X	
01-06	Community Reinvestment (CR) Funds Instructions for Identifying Funds to Carry-Over Into 2002 and Applying for Emergency Needs Funds Generated Through the CR Carry-Over Process						X	X
01-07	Instructions for Re-engineering for Right of First Selection Agencies for the Next W-2 Contract						X	
01-08	WAA Deobligation and Reallocation Information						X	X
01-10	2002 Base Income Maintenance Administrative Allocation – Preliminary Notice			X		X	X	
01-11	CY/PY 2002 Child Care, Public Assistance Fraud, Medicaid Transportation, and Funeral/Cemetery Allocation Information – Preliminary Notice	X				X		

**Child Support Bulletins**

Child Support Bulletins that pertain to Income Maintenance and W-2 and Related Programs are listed.

No.	Title	CC	CS	FS	IT	MA	W-2	TANF
97-01	Credit Bureau Usage	X	X	X	X	X	X	X
97-04	W-2 Transitions Study		X				X	
97-11	Intensive Services for AFDC Clients		X				X	
97-12	Healthy Start Cases		X			X		
97-16	Cooperation and Good Cause Under W-2		X			X	X	
98-39	Welfare to Work Program		X				X	
99-01	Instructions for Accepting Non-Automated Pre-Eligible W-2 Referrals		X				X	
99-16	Referrals to Child Support for W-2 Child Care Cases	X	X				X	
99-19	Verifying Cooperation Status of Noncustodial Parents	X	X	X		X	X	X
99-24	Implementation of BadgerCare		X			X		

**Operations Memos**

Operations Memos no longer on this list are either obsoleted or have been incorporated into relevant manuals.

No.	Title	CC	CS	FS	IT	MA	W-2	TANF	RCA/ RMA
95-17	Accurate School District Code				X		X		
96-08	CARES/KIDS Interface Instructions				X				



**Appendix F: Listing of the Department's Policies and Procedures (continued)**

No.	Title	CC	CS	FS	IT	MA	W-2	TANF	RCA/ RMA
96-10	CARES: Data Exchange—SWICA Instructions				X				
96-103	Wisconsin Development Zone Program						X		
97-31	Financial & Employment Planner (FEP) Staffing Levels						X		
97-33	Child Care Funding for Tribes	X							
97-50	Worker's Compensation for Work Experience Participants & Transition to W-2						X		
97-64	Wisconsin Works (W-2) Trial Jobs Employer Agreement General Provisions						X		
97-69	Transfer of Economic Support and Child Care Cases	X		X	X	X	X	X	
97-75	Repayment Agreements & Dunning Notices				X	X	X		
97-80	CARES Changes Related to Security & Administrative				X				
97-84	Revised Refugee/Entrant Assistance Accounting Forms			X			X	X	
97-106	W-2 Job Access Loan (JAL) Program						X		
97-107	CARES Reports for W-2						X		
97-112	Handling a Crisis Case: A Reference Guide						X		
97-115	Worker's Compensation Coverage & Exposure						X		
97-125	W-2 Educational Brochures for Working Parents						X		
97-128	W-2 Learnfare Policy						X		
97-129	W-2 Participants & SSI						X	X	
97-132	W-2 Job Access Loan (JAL) Policy Clarification & Program Guidelines						X		
97-136	CARES in Fraud Referral & Tracking	X	X	X	X	X	X	X	
98-11	Update and Maintenance of Components & Status Reporting			X	X		X		
98-12	W-2 Payments & Changing a Placement						X		
98-14	State-Only W-2 Payment for SSI Applicants						X	X	
98-15	Occupations Requiring Background Checks						X		
98-21	CARES Technical Guidance for State-Only W-2 Payments for SSI Applicants				X		X		
98-22	JTPA Policy Change						X		
98-23	Full Engagement						X		
98-30	W-2 Two-Parent Policy Clarification						X		
98-34	Emergency & Back-Up Child Care	X							
98-50	Re-coding Qualified Aliens for FS, MA, & W-2 Eligibility	X		X	X	X	X	X	
98-52	Reporting of W-2 Placements & Participation (Including Data Clean-Up)				X		X		
98-53	Re-Implementation of Entered Employment Follow-Through Contacts						X		
98-54	Benefit Recovery Clarifications				X		X		
98-62	CARES Production Calendar Available on New CBT Course				X				
98-63	Caretaker Supplement (C-Supp) Changes							X	
98-64	Parents Caring for Children with Special Needs						X		
98-72	W-2 Learnfare Policy Corrections						X		
98-75	Child Support Unearned Income Coding in CARES	X	X	X	X	X	X	X	
98-76	Updates to Wisconsin Works Information (ACWI) in CARES				X		X		

## Appendix F: Listing of the Department's Policies and Procedures (continued)

No.	Title	CC	CS	FS	IT	MA	W-2	TANF	RCA/ RMA
98-82	Forms Retention & Verification Guidelines	X	X	X	X	X	X	X	
98-84	FEP ID and W-2 Notice Update--"CARES Notice & Letters Self-Study Guide"				X				
98-85	Accessing DES Forms on the Extranet	X	X	X	X	X	X	X	
98-91	Plan Guidelines for the Outstationing of Eligibility Workers	X	X	X	X	X	X	X	
99-01	Listing – 1998 DES Administrator's Memos	X	X	X	X	X	X	X	
99-04	Entrepreneurship Efforts on Behalf of FS, WtW, and W-2 Participants			X			X	X	
99-08	Association of Overpayments with Office Number in the Benefit Recovery Subsystem	X		X	X		X	X	
99-14	CARES New Hire Data Exchange				X				
99-28	Healthy Start Outstationing	X	X	X	X	X	X	X	
99-29	Caretaker Supplement Payment Problems							X	
99-32	Welfare-to-Work (WtW) Information						X		
99-34	Availability of Written Information on Economic Support Programs	X	X	X	X	X	X	X	
99-37	Paper Case Records	X	X	X	X	X	X	X	
99-38	Prisoner Verification Query	X	X	X	X	X	X	X	
99-39	Using the CARES WTPY Request for SSA Dual and Triple Entitlement Data	X	X	X	X	X	X	X	
99-40	State Online Query (SOLQ)	X	X	X	X	X	X	X	
99-41	CARES Changes for W-2 Time Limits						X		
99-43	Non W-2 Public Assistance Cases With Child Support Orders In Other States	X	X	X		X	X	X	
99-48	W-2 24 Month Time Limit & Case Management						X		
99-51	MMIS Query Access				X				
99-54	Recovering Learnfare Penalty From W-2 Trial Job Participants						X		
99-58	Clarification of Food Stamp and FSET Policy			X			X		
99-59	Write Off/Adjustment Policy & Write Off Form	X	X	X	X	X	X	X	
99-60	Posting W-2 Employment Position Time Limit Extensions Information in CARES				X		X		
99-65	Dual & Triple Entitlement Data Received From WTPY, BENDEX or SOLQ	X	X	X	X	X	X	X	
99-69	CARES Enhancements for Posting and Tracking of W-2 Employment Position Clock Extensions						X		
99-71	Increasing Enrollment in the Welfare to Work (WtW) Program –New Strategies						X		
99-74	Child Care Temporary Absence Policy	X							
99-75	State Online Query (SOLQ)	X	X	X	X	X	X	X	
99-81	1999 Wisconsin Act 9 – Child Care Policy Changes	X							
99-83	CARES Automated Tracking System (CATS)				X				
99-84	State Job Opportunities						X		
99-85	CARES Security & Access to the State Online Query (SOLQ)	X	X	X	X	X	X	X	
99-89	W-2 24-Month Extensions						X		

## Appendix F: Listing of the Department's Policies and Procedures (continued)

No.	Title	CC	CS	FS	IT	MA	W-2	TANF	RCA/ RMA
99-90	Funeral Reimbursement Maximum					X	X		
99-93	Child Care Resource & Referral (CCRR) Grants for Start-Up and Expansion (January 1, 2000 — December 31, 2001)	X							
99-97	Tracking of Manual Issuance of W-2 & FS in CARES			X	X		X		
00-03	Processing Case Changes & Closures in CARES	X		X	X	X	X	X	
00-05	Technical College Participation for CSJ & W-2T Participants						X		
00-06	W-2 Income Policy Changes						X		
00-08	Emergency Assistance							X	
00-09	Individual Development Account (IDA) Programs			X		X	X	X	
00-10	Entered Employment: 1. Clarifications 2. Definition Expanded			X			X		
00-12-C	Changes to CARES Screen APGI & The IV-A/IV-D Interface (Corrected)	X	X	X	X	X	X	X	
00-13	Child Care Providers 1. Offenses Affecting Caregiver Eligibility 2. Revisions to HFS 12	X							
00-16	CARES Automated Tracking System (CATS) Update	X	X	X	X	X	X	X	
00-17	Child Day Care Manual Online	X							
00-23	Caregiver Background Check Update	X							
00-24	Treatment of Census Earnings	X		X		X	X	X	
00-26	Additional Guidelines For Prorated CSJ Policy						X		
00-27	W-2 24-Month Interim Extensions						X		
00-28	W-2 24-Month Time Limit Extensions Policy Reminder						X		
00-29-C	Clean-Up Reports for Absent Parent Screen APGI-Corrected	X	X	X	X	X	X	X	
00-30	File Codes	X	X	X	X	X	X	X	
00-32	CARES Review Notices & Alerts	X	X	X	X	X	X	X	
00-33	Workforce Attachment & Advancement (WAA) Participant Application and Eligibility Determination	X	X	X	X	X	X	X	
00-37	IVA/IVD Interface Mis-Match Report			X	X	X	X		
00-41	Refugee Cash Assistance & Refugee Medical Assistance				X	X			X
00-42	Child Care – Safe Child Initiative	X							
00-45	Child Care Call Center	X							
00-48	Child Care Provider File	X			X				
00-52	2000 Child Care Survey --- For Determination of 2001 Maximum Rates	X							
00-55	WAA & WtW CARES Training Courses						X	X	
00-58	CARES Changes to Absent Parent Parent Screens			X	X	X	X	X	
00-59	CARES – WtW & WAA Screens				X		X	X	
00-60	Community Reinvestment						X		
00-62	Workforce Attachment and Advancement (WAA) & Welfare-to-Work (WtW) Data Sharing & CARES Access				X		X		
00-67	W-2 Fact Finding Review Report						X		

## Appendix F: Listing of the Department's Policies and Procedures (continued)

No.	Title	CC	CS	FS	IT	MA	W-2	TANF	RCA/ RMA
00-68	Child Care Updates: <ul style="list-style-type: none"> <li>School Age Certification &amp; Rehabilitation Reporting Forms</li> <li>New Food Program Policy</li> <li>Use of Internet to Request Caregiver Background Checks</li> <li>Reporting Requirement for Certification Denials/Revocations</li> <li>Age When Caregiver Background Check is Required</li> </ul>	X							
00-70	Community Reinvestment (CR)						X		
00-71	Child Care: <ol style="list-style-type: none"> <li>Eligibility for Kinship Care Parents</li> <li>New Copayment Rules for Foster Care, Court Ordered &amp; Non-Court ordered Kinship Care Children</li> </ol>	X							
00-72	W-2 Performance Standards						X		
00-73	WtW/WAA CARES Backdating				X		X		
00-74	Emergency Assistance Application Processing						X		
00-78	Office Change Coding for Children First (CF), Welfare-to-Work (WtW), and Workforce Attachment & Advancement (WAA)				X		X		
00-83	Minor's Liability for Overpayments	X		X	X	X	X		
00-84	Workforce Attachment & Advancement (WAA) Guide Wisconsin's Literacy Providers Directory				X		X	X	
00-85	BWSP Operations Memos on Workweb & Partner Page	X	X	X	X	X	X	X	
00-86	IVA-IVD (CARES/KIDS) Interface Changes - KIDS PIN Numbers		X	X	X	X	X	X	
00-90	W-2 Payments Using EFT				X		X		
00-91	Workforce Attachment & Advancement (WAA) Service Guidelines						X	X	
00-92	W-2 Eligibility for VISTA Volunteers						X		
01-03	Learnfare Reporting						X		
01-05	CARES Reason Code Changes	X	X	X	X	X	X		
01-06	CARES Client Notice Redesign (CNRD)	X		X	X	X	X		
01-08	Child Care Policy Changes	X							
01-09	TANF Received in Other States						X		
01-10	Eligibility Limit Changes – Workforce Attachment & Advancement (WAA), Literacy Grants, and Community Youth Grants				X		X	X	
01-11	Workforce Attachment & Advancement (WAA) Performance Standards				X			X	
01-12	<ol style="list-style-type: none"> <li>Applications Running for 3 Months</li> <li>Removal of CARES Reason Code 142 for W-2, Child Care &amp; Medicaid</li> </ol>	X			X	X	X		
01-14	CARES Information/Policy Problem Resolution Center (a/k/a, "CARES Call Center")	X	X	X	X	X	X	X	X
01-17	Wisconsin Works (W-2) & Wisconsin Share (Child Care Subsidy) Program – Federal Poverty Level Changes	X			X				

**Appendix F: Listing of the Department's Policies and Procedures (continued)**

No.	Title	CC	CS	FS	IT	MA	W-2	TANF	RCA/ RMA
01-19	State-Only W-2 Payment Policy				X		X		
01-21	W-2: Inappropriate Sanctions				X		X		
01-26	W-2 and SSI Eligibility						X		
01-27	Technical College Participation in W-2						X		
01-30	60-Month Time Limit Extensions and Updated 24-Month Extension Policies						X		
01-37	W-2 Case Monitoring						X		
01-38	2001 Child Care Survey – For Determination of 2002 Maximum Rates	X							

This policies and procedures list is not intended to repeal or exclude applicability of other materials provided by the Department including emails and letters. Although the intent is that this compilation be a comprehensive overview of all major written sources of policy and procedure, applicable items may be been inadvertently omitted.

\*The category indication is intended as information only and does not limit the applicability of the Department's Policies and Procedures.

## Appendix G: Models For W-2 Service Delivery Within The Job Center System

The Job Center System is the primary vehicle for the delivery of employment and training programs, including W-2 and related programs. The Local Collaborative Planning Team (LCPT), through the Core Coordination Document (CCD) planning process, designates Job Center sites and affiliated Other Service Sites. It is the State's goal to move W-2 services delivery to Models A and B (See below.)

There are several categories of W-2 services that are suited for delivery through the Job Center System. These basic services include providing resource information and referral to interested individuals; conducting program intake and eligibility determinations; assessing program participant skills and service needs; conducting job search and job readiness activities; providing case management; coordinating support services such as child care and transportation; and providing employer relations activities.

Other categories of W-2 services are often delivered at locations outside of the Job Center System, including work experience (at work sites); occupational training (at training centers and educational institutions); substance abuse and mental health services (at provider sites).

Models of W-2 Service Delivery through the Job Center System:

- Model A. Full integration of W-2 services into the Job Center System and complete collocation of W-2 services and staff at a Job Center site.
- Model B. Full integration of W-2 services into the Job Center System and collocation of W-2 services and staff at a combination of the Job Center and Affiliated Service Sites. This model may apply when there are networks of affiliated sites, the need to maintain geographic coverage for a W-2 geographic area, or limited space at the Job Center site.
- Model C. Partial integration of W-2 services into the Job Center System and limited use of the Job Center and Affiliated Service Sites. An example of this model includes W-2 staff working out of Job Centers on a part-time basis while the primary site for the delivery of W-2 services and the location of W-2 staff is a site not designated as a Service Site in the local Job Center System.
- Model D. Limited integration of W-2 services into the Job Center System and infrequent use of the Job Center and Affiliated Service Sites. The primary connection between the W-2 service delivery site and the Job Center is an electronic link to promote staff communication and allow W-2 program participants to access the JobNet system from the W-2 service delivery site.
- Model E. Delivery of W-2 services at a non-Job Center System site. This model may apply to a W-2 geographic area that does not have a Job Center site. The W-2 agency may have an electronic link to a Job Center in another W-2 geographic area.

## Appendix H: Performance Standards for the 2002-2003 W-2 and Related Programs Contract

### PERFORMANCE STANDARDS FOR THE 2002-2003 W-2 AND RELATED PROGRAMS CONTRACT

The Performance Standards have been established to measure appropriate and quality services being provided to W-2 and FSET participants. Performance Standards are organized by required criteria, optional criteria, and criteria used for information only.

This chart shows the required Performance Standards for:

1. Base Contract compliance (in addition to the other standards included in the Department's policies);
2. Right of First Selection for the next W-2 Contract (Contract Period 2004-2005). (Requirements for Right of First Selection shall be the same as meeting Base Contract Compliance benchmarks for all criteria.) (Note: Right of First Selection status under this provision may be lost under section 6.16.2 of the Contract.)
3. Restricted Use Performance Bonus (Community Reinvestment); and
4. Unrestricted Use Performance Bonus.

Information will be measured for the period of January 1, 2002 through December 31, 2003. (Right of First Selection will be measured for the period January 1, 2002 through December 31, 2002.) Performance Standards are measured Contract-to-Date or Point-in-Time. Those designated as Contract-to-Date are cumulative beginning January 1, 2002 through the last working day of the report month. Those designated as Point-in-Time are measured on the last working day of each calendar month and an average for all months will be calculated to determine if the criteria have been met. **Note:** For a new W-2 agency, the first quarter will be excluded from each calculation to reflect agency start-up and transition if the W-2 agency requests the exclusion of the first quarter data by notifying the Department in writing by 12/27/02 to request this exclusion.

#### One Case Credit

In order to recognize that in agencies, especially those with small caseloads, one case can make a significant difference in the calculation of the Performance Standards benchmarks, a One Case Credit is established.

A One Case Credit will apply when:

- a) The Department makes the final determination of whether a W-2 agency meets a benchmark level for a Performance Standard criteria;
- b) The W-2 agency does not meet a Benchmark for one or more of the following criteria: Entered Employment Placement Rate; Job Retention Rates; Full and Appropriate Engagement; Basic Educational Activity; Earnings Gain; Educational Activities Attainment.
- c) At least one of the W-2 agency's cases does not meet one or more of the benchmarks for the criteria in b) above; and
- d) The W-2 agency would meet a Benchmark for a criteria listed in b) above if one case that did not meet the criteria was instead considered by the Department to meet the criteria.

The One Case Credit will be applied only once per agency per criteria listed in b) above. The application of the One Case Credit will result in the W-2 agency meeting the Base Contract Compliance Benchmark or the next Benchmark beyond the Benchmark that the W-2 agency would otherwise meet without the application of the One Case Credit. Example: A W-2 agency meets the Base Contract Compliance Benchmark for Entered Employment Placement Rate but does not meet the Restricted Use Performance Bonus (Community Reinvestment) benchmark or the Unrestricted Use Performance Bonus

**Appendix H: Performance Standards for the 2002-2003 W-2 and Related Programs Contract (continued)**

Benchmark. Application of the One Case Credit would allow the agency to meet the Restricted Use Performance Bonus (Community Reinvestment) benchmark but not the Unrestricted Use Performance Bonus Benchmark.

**Zero Case Credit**

The Department will apply a special Zero Case Credit to any W-2 agency with no cases for a Performance Standard (if there are any W-2 agencies with zero cases at the time of the Department's Performance Standards calculations). The Zero Case Credit will result in any W-2 agency with no cases meeting the Base Contract Compliance Benchmark and Right of First Selection (RFS) Benchmark, but not meeting the Restricted Use Performance Bonus Benchmark and Unrestricted Use Performance Bonus Benchmark. In order to be eligible for a Restricted Use Performance Bonus (Community Reinvestment) or an Unrestricted Use Performance Performance Bonus, the W-2 agency must have at least one case for the Performance Standard.

**Worker Error Adjustment**

The Worker Error Adjustment process outlined in BWSP Operations Memo 00-72, which was developed to address unusual or non-recurring events, will remain in effect for the 2002-2003 Contract Period. To request consideration, a W-2 agency must submit a written request in accordance with the Department's Policies and Procedures.

**Risk Protection Adjustment**

At the request of a W-2 agency that is not a tribal agency the Department will reassess the Performance Standards benchmark when the county's average unemployment percentage rate for the most recent three (3) months period is at least 6.5% and at least equal to 110% of the county's unemployment rate for the corresponding three (3) months period in either of the two (2) preceding calendar years. At the request of a tribal W-2 agency, the Department will reassess the contract benchmark if the tribal government documents the following: a tribally operated enterprise employing at least 10% of the tribal workforce has closed for at least a 3 month period; or there has been at least a 10% reduction in the tribe's per capita payment for the most recent 3 month period, compared to the corresponding 3 month period in either of the 2 preceding calendar years.

The Risk Protection Adjustment is designed to allow unique circumstances related to unemployment of each rate agency to be considered by the Department. Use of this adjustment in the 2002-2003 Contract Period will take the place of the regression analysis model identified in the 2000-2001 W-2 Contract, as the Risk Protection Adjustment accounts for local labor market conditions and unemployment rates. The Department will apply this adjustment as follows:

The unemployment rate for the county is converted into an employment rate by subtracting the unemployment rate from 100. For each Performance Standard to which the Risk Protection Adjustment applies, the benchmark is multiplied by the agency's unemployment rate and is then divided by 93.5.

Example:

County average unemployment rate is 12%

Employment rate = 88 (100-12)

Entered Employment Placement Rate standard would be adjusted as follows:

$$\frac{35 \text{ (Benchmark)}}{93.5} = \frac{x}{88}$$

x = 32.94%, the new Benchmark level



## Performance Standards – Required Criteria

Performance Expectation	Indicator	Benchmark	Base Contract Compliance	RFS for future W-2 Contract	Restricted Use Performance Bonus (Community Reinvestment)	Unrestricted Use Performance Bonus
Meet Priority Outcomes for Participants	Entered Employment Placement Rate (Contract-to-Date)	For W-2 and FSET Participants: A percentage of the total participants served by the agency have an Entered Employment placement reported. For the Base Contract Compliance and RFS for future contract measures, this criteria applies to all full and part time jobs lasting 30 days or more, as reported for participants in FSET and W-2 participants in subsidized employment (W-2 T, CSJ, and Trial Jobs) and case management positions. For Restricted Use Performance Bonus and Unrestricted Use Performance Bonus, the measurement will be for full time jobs lasting 30 days or more.	35%  Applies to both full and part-time jobs.	35%  Applies to both full and part-time jobs	35%  Applies to full-time jobs	40%  Applies to full-time jobs
	Job Retention Rates: (Contract-to-Date)	For W-2 and FSET Participants: The Job Retention Rate is calculated for each of the following: a) The percentage of participants with a 30-Day Follow-Through Contact Due that remain employed at the 30-Day Follow-Through Contact; and b) The percentage of participants with a 180-Day Follow-Through Contact Due that remain employed at the 180-Day Follow-Through Contact. This criteria applies to participants in FSET and W-2 subsidized and case management positions for whom an Entered Employment transaction was reported for full or part time jobs lasting 30 days or more. The participant may be employed with the same or different employer at the 30 <sup>th</sup> or 180 <sup>th</sup> day after the Entered Employment is recorded. Both a. and b. must be met.	a. 75% b. 50%	a. 75% b. 50%	a. 80% b. 55%	a. 85% b. 60%
	Full and Appropriate	a) For W-2 and FSET Participants: The adult participants in FSET and W-2	80%	80%	85%	90%

Performance Expectation	Indicator	Benchmark	Base Contract Compliance	RFS for future W-2 Contract	Restricted Use Performance Bonus (Community Reinvestment)	Unrestricted Use Performance Bonus
	Engagement (Point-in-Time)	subsidized employment positions are engaged in appropriate activities for the required number of hours and have a current, printed Employability Plan. b) For W-2 Only: Special Requirement for W-2 Extension Cases: Included in the number of hours of activities, W-2 participants in Extension must have one or more of the following activities assigned: AODA Assessment, AODA Counseling, Disability Assessment, Mental Health Assessment, Mental Health Counseling, SS(D)I Advocacy/ Application, Physical Rehabilitation, Domestic Violence Services, Personal Care. Both a. and b. must be met.				
	Basic Education Activities (BEA) (Point-in-Time)	For W-2 Participants only: Adults in W-2 subsidized employment positions who are not designated as high school graduates on CARES (ANSE screen), are assigned to appropriate educational and training activities which include GED (GE), HSED (HS), adult basic education (BE), literacy skills (LS), English as a Second Language (ES), regular high school (RS), and job skills training (JS).	80%	80%	85%	90%
	Educational Activities Attainment (Contract-to-Date)	For W-2 Participants Only: W-2 participants who enter and complete an educational activity, job skills training, or technical college activity. A participant is counted once during the two-year contract period, regardless of the number of times the participant entered and completed any one or more of the following activities: GED (GE), HSED (HS), adult basic education (BE), literacy skills (LS), English as a Second Language (ES), regular high school (RS), job skills training (JS), and Technical College (TC).	35%	35%	40%	45%
	Earnings Gain (Contract-to-Date)	For W-2 Participants Only: W-2 participant earnings are compared at one	50% with any earning	50% with any earning	50% with average monthly gain of \$50	50% with average

Performance Expectation	Indicator	Benchmark	Base Contract Compliance	RFS for future W-2 Contract	Restricted Use Performance Bonus (Community Reinvestment)	Unrestricted Use Performance Bonus
		point in time with earnings at a later point in time during program participation. The start and end dates of a CMU (case management for unsubsidized employment) or CMF (case management follow-up) placement will be used to determine the time period. Increased hours as well as increased hourly wage rate are included.	gain	gain		monthly gain of \$100
Deliver high quality and effective case management services	FEP to caseload ratio (Point-in-Time – each month averaged to determine the quarter results)	For each quarter of the contract period, no FEP may have a caseload of more than fifty-five (55) W-2 payment cases. A FEP caseload may not exceed one hundred twenty-five (125) total cases (including FSET, non-custodial parent, and case management only cases, in addition to W-2 payment cases. Each W-2 agency has the option to submit (as a part of their RFS Re-contracting response or RFP response) an alternative measure for approval by the Department that is equivalent to the 55 to 1 ratio. For example, if an agency had a specialty FEP who was bilingual, that FEP may have a caseload of fewer than 55 payment cases, and another FEP would have a caseload of greater than 55 cases; however, those cases would have fewer barriers or special needs. Merely averaging the number of all FEPs across the entire caseload is not acceptable as an alternative measure. Vacant positions cannot be included in the calculation. In order to address routine turnover, each agency may have a 5% variance per quarter.	Meets requirement for all 8 quarters	Meets requirement for first 4 quarters	N/A	N/A
	W-2 agency staff meet training requirements Point-in-Time, December only)	The percentage of the W-2 agency staff * must have been determined by the Department to be in compliance with training requirements (completed all required training in accordance with the Department's policies by the end of December of each year of the contract or been granted an extension by the Department). The standard is less than 100 percent to take into account factors such as class cancellation.	90%	90%	95%	100%

Performance Expectation	Indicator	Benchmark	Base Contract Compliance	RFS for future W-2 Contract	Restricted Use Performance Bonus (Community Reinvestment)	Unrestricted Use Performance Bonus
		*Subcontractor staff who perform the job responsibilities of the W-2 agency staff, such as FEP case management, also must meet this standard.				
	Assessment for Appropriate W-2 Placement and Extension (Point-in-Time)	<p>For W-2 Participants Only:</p> <p>A percentage of the W-2 participants who are placed in unsubsidized or subsidized employment placements must receive assessment services as described below:</p> <p>a. Participants who are placed in a W-2 placement (either initially or as movement from one placement to another) must have an assessment initiated and documented in CARES within 30 calendar days from the date of placement in the placement. The assessment can either be a formal or informal assessment as defined in the W-2 Manual and based on the W-2 policy requirements for the type of case. Comment: An informal assessment must be done prior to or concurrent with the initial placement.</p> <p>b. Participants who placed in W-2 Transition (W2T) must have a formal assessment initiated and documented in CARES within 30 calendar days of placement into W2T. This formal assessment must be by a medical or mental health professional, Division of Vocational Rehabilitation (DVR) counselor or similar qualified assessing agency or business</p> <p>Both a. and b. must be met.</p>	<p>a. At least 80%</p> <p>b. At least 80%</p>	<p>a. At least 80%</p> <p>b. At least 80%</p>	<p>a. At least 85%</p> <p>b. At least 85%</p>	<p>a. At least 90%</p> <p>b. At least 90%</p>
	Timely and complete processing of 24 and 60-month extension requests (Contract-to-Date)	<p>For W-2 Participants Only:</p> <p>a. On a cumulative basis, the percentage of the extension requests submitted by the W-2 agency to DWD must meet the timeliness policies for extension requests. This includes submittal of complete documentation based on the 24 and 60-month checklists and forwarded timely to the</p>	a. At least 85%	a. At least 85%	N/A	N/A

Performance Expectation	Indicator	Benchmark	Base Contract Compliance	RFS for future W-2 Contract	Restricted Use Performance Bonus (Community Reinvestment)	Unrestricted Use Performance Bonus
		<p>Department in accordance with the Department's policies.</p> <p>b. Extension information, including extension denials by the W-2 Agency or DWD as well as extension approvals, must be entered into CARES timely. Timely CARES documentation is described in policy and includes proper notification to the participant of extension decisions.</p> <p>Both a. and b. must be met.</p>	b. At least 95%	b. At least 95%		
Deliver Services that Meet Customer Expectations	W-2 Agency service meets or exceeds expectations for consumer satisfaction (Contract-to-Date)	<p>Agencies must achieve an average score on each item of 6.5 or greater on a 10-point scale on each of the following 10 items:</p> <ul style="list-style-type: none"> <li>• Staff clearly explained what programs and services were available</li> <li>• Staff treated participants with respect</li> <li>• Staff was helpful</li> <li>• Staff assisted in transportation, if needed</li> <li>• Staff assisted in child care, if needed</li> <li>• Staff returned phone calls within two business days</li> <li>• Agency was open when participants could come in</li> <li>• Staff set up after office hours, if needed</li> <li>• Participants felt comfortable going to the agency</li> <li>• Participants were satisfied, overall, with service</li> </ul>	Average score on each item must be 6.5 or greater.	Average score on each item must be 6.5 or greater.	N/A	This Performance Bonus will be proportionately allocated to the agencies having the 10 highest cumulative scores. This proportionate allocation will be an amount that is up to 200% of the amount that would be the agency's share based on proportionate allocation to W-2 agencies using the proportions in the W-2 Base Allocation chart.

<b>Performance Expectation</b>	<b>Indicator</b>	<b>Benchmark</b>	<b>Base Contract Compliance</b>	<b>RFS for future W-2 Contract</b>	<b>Restricted Use Performance Bonus (Community Reinvestment)</b>	<b>Unrestricted Use Performance Bonus</b>
Agency Accountability	Financial Management (Contract-to Date)	W-2 agency must meet the Department's requirements for audits (agency has no significant audit finding as determined by the Department in its Single Agency Audit or any audit conducted by the Department or Legislative Audit Bureau).	Must meet	Must meet	N/A	N/A
	Contract Compliance (Contract-to Date)	W-2 agency must meet the Department's contract compliance requirements (agency is not and has not been subject to a Corrective Action Plan for substantial non-compliance as determined by the Department, under the 2002-2003 W-2 Contract).	Must meet	Must meet	N/A	N/A

**PERFORMANCE STANDARDS – OPTIONAL CRITERIA**

Faith-Based Contracts: There is a valid contract or memorandum of understanding between the W-2 agency and a faith-based provider (as defined in section 6.54 of the Contract) to provide direct services, (e.g., transportation, basic skills training) to W-2 participants* under the W-2 Contract. Services must be provided under the contract. One or more contract(s) must be signed and in effect for seven of the eight quarters of the W-2 Contract Period. The contract(s) does not need to be with the same provider(s) for the entire W-2 Contract Period.	Copy of the signed contract(s) submitted to the Department's Contract Manager and documentation of services being provided.	Valid Contract and service provision
SSI Advocacy: There is a valid contract or memorandum of understanding between the W-2 agency and a SSI advocacy agency or the W-2 agency has a trained SSI advocate on staff. DWD will define SSI Advocacy service requirements in policy.	Signed contract with service provision or documentation of staff effort submitted to the Department's Contract Manager.	Valid Contract and service provision
Available Employer Health Insurance Benefits	Employer health insurance benefit is available with the first 180 days of employment as identified in CARES on the Entered Employment transaction.	50% of the Entered Employments reported have Available Employer Health Insurance

In the calculation of the Unrestricted Use Performance Bonus, a W-2 agency may request the use of one of the above optional criteria as a substitution for the Unrestricted Use Performance Bonus for one of the six (6) required Meet Priority Outcomes for Participants Performance Standards. A maximum of one substitution may be requested by the W-2 agency.

**PERFORMANCE STANDARDS – FOR INFORMATION ONLY**

<b>Indicator</b>	<b>Measurement</b>
Average Wage at Placement	The average wage rate attained during the contract period as compared to the average wage rate attained during calendar year 2000 for the agency's FSET and W-2 population.
Addressing Barriers	This measures the percentage of participants in one of following W-2 components: Physical Rehabilitation, AODA Assessment, AODA Counseling, Mental Health Assessment, Mental Health Counseling, SSI advocacy, Caring for a Disabled Family Member, Caring for a Disabled Child, and Domestic Violence Services. This is not meant to emphasize barriers but rather to measure activities that are designed to reduce or deal with barriers.
Expanded Caseload: Emphasizes serving broader population of working poor.	This measures the levels of work program participants in Children First (CF), Welfare to Work (WtW), and Workforce Attachment and Advancement (WAA).
In Work Supports (EITC, CC, MA, FS, Child Support)	This measures levels of in-work supports.
Moving Out of Poverty Indicator	This measures earnings using UI wage data for W-2, FSET, CF, WAA, WtW and other work program participants. It will be measured during and after program participation.
Recidivism Rates	This measures the percentage of new W-2 participants receiving cash payments who previously received W-2 cash and had an interlude of at least 2 months without receiving cash payments.
18 and 19 Year Olds in School	Activities and Employment



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